



Prospect Worksheet— Institutional Funders

Date:		
<i>Basic Information</i>		
Name		
Address		
Contact Person		
<i>Financial Data</i>		
Total Assets		
Total Grants Paid		
Grant Ranges/Amount Needed		
Period of Funding/Project		
<i>Is Funder a Good Match?</i>	<i>Funder</i>	<i>Your Organization</i>
Subject Focus (list in order of importance)	1.	1.
	2.	2.
	3.	3.
Geographic Limits		
Type(s) of Support		
Population(s) Served		
Type(s) of Recipients		
People (Officers, Donors, Trustees, Staff)		

Application Information

Does the funder have printed guidelines/application forms?

Initial Approach
(Letter of inquiry, formal proposal)

Deadline(s)

Board Meeting Date(s)

Sources of Above Information

990-PF — Year

Annual Report — Year

Requested Received

Directories/Grant Indexes

Grantmaker Website

Foundation Directory Online

Notes:

Follow-up:

Area(s) of Commonality with the Prospect

Prior giving history:

Geography:

Subject field:

People:

Other:

Sources Consulted (provide URLs, dates, and other details)

Search engines (terms used):

Websites:

Databases:

Contribution lists:

Directories:

Newspapers:

Other:

History of Past Cultivation (if any)

Type (letter, call, invitation, meeting, etc., and dates):

Recommended Next Step(s)

(Indicate deadlines):